

Single-use Bioprocessing Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Single-use Bioprocessing Market Report

The global single-use bioprocessing market by revenue is expected to grow at a CAGR of 17% during the period 2021–2026.

The outbreak of the COVID-19 pandemic has boosted the demand for single-use bioprocessing (SUB) technology. The ongoing robust R&D activities and clinical studies on the Covid-19 vaccine are encouraging many stakeholders to use SUB technology. Modalities such as covid-19 vaccine requirement, cell and gene therapies, and monoclonal antibodies are likely to influence the single-use bioprocessing market growth. The majority of biomanufacturing companies rely on advanced technology such as single-use systems to develop the vaccine.

The following factors are likely to contribute to the growth of the single-use bioprocessing market during the forecast period:

Increasing Strategic Acquisitions & Partnerships

New Product Launches

High Utilization of Single-use Bioprocessing for Covid-19 Vaccine Production

Technological Advances in SUB

The study considers the global single-use bioprocessing market's present scenario and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Single-Use Bioprocessing Market Segmentation

The global single-use bioprocessing market research report includes a detailed segmentation by product, application, end-user, method, geography. Single-use bioprocessing products are observing growth due to advances in equipment, higher scalability, and the increased application in the biopharmaceutical industry. Bioreactors and fermenters cover significant shares among SUB. The use of bioreactors and fermenters is growing for the development of biosimilars & biologics. The availability of single-use chromatography systems is considered a solution for single-use downstream bioprocessing. The use of membrane formats, scaling technologies, ion exchange technology, and polymeric column constructions is shifting end-users toward SUBs in downstream processes. Chromatography systems combined with tangential flow filtrations provide the highest productivity in downstream separation and purification steps.

The increased application of monoclonal antibodies (mABs) for the diagnosis and treatment of autoimmune disorders, cancer, and sexually transmitted infections (STIs) is boosting the single-use bioprocessing market growth. The production of mABs via single-use bioreactors reduces the operating cost and offers more flexibility than traditional stainless steel equipment. Also, the use of SUB in mABs manufacturing increases capacity, productivity, and flexibility. The utilization of SUBs in vaccine manufacturing is catching pace and is considered the smart method, especially during pandemics. They have become an ideal choice among manufacturers as they can be manufactured in a short time and do not require validation and have a reduced risk of contamination. Furthermore, single-use systems help enhance flexibility in small and large vaccine manufacturing and produce multiple products in a single suite.

Biopharmaceutical manufacturers occupy a significant share of the market, with single-use systems witnessing adoption in pre-commercial production processes. Several biopharmaceutical manufacturers have started to explore these solutions in commercial manufacturing. However, their potential benefits are significant, particularly for small-volume manufacturing in modular facilities. With the advent of single-use bioprocessing, the bioprocessing industry's dynamics have changed, enabling companies to develop

new biologics with higher flexibility and low upfront costs. As technology has become increasingly popular, many companies are becoming interested in the widespread adoption of single-use bioprocessing.

Advances in the cell culture process and biopharmaceutical manufacturing is leading to the development of innovative single-use technology. Single-use bioreactors are increasingly used for animal and human cell production processes. SUBs in mammalian cell culture result in high flexibility, reduced cost, and enhanced product productivity. They are increasingly being used for small-batch, large-batch volumes, clinical trials, and process development.

Product

- Single-use Bioprocessing Equipment

- Simple & Peripheral Devices

Application

- Monoclonal Antibodies (mABs)

- Vaccines

- Cell Therapies

- Others

End-users

- Biopharmaceutical Manufacturers

- Contract Manufacturing Organizations (CMOs)

- R&D Companies & Research Institutes

Method

Filtration

Storage & Transport

Cell Culture

Mixing

Purification

INSIGHTS BY GEOGRAPHY

North America and Europe constitute over 75% of the market share; however, the APAC region is expected to grow at the fastest CAGR of over 19% during the period 2020–2026. The increasing spending on biopharmaceutical research activities in the US and Canada, the presence of large-scale manufacturing facilities, and the growing demand for single-use technology contribute to the region's growth.

Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

Switzerland

APAC

China

India

Japan

South Korea

Australia

Latin America

Mexico

Brazil

Argentina

Colombia

Middle East & Africa

Saudi Arabia

Turkey

South Africa

UAE

INSIGHTS BY VENDORS

Thermo Fisher Scientific, Sartorius Stedim Biotech, Merck KGaA, Danaher Corporation, and Avantor are the key vendors operating in the global single-use bioprocessing

market. The key players are increasing their focus on mergers and acquisitions in the past few years. With the sudden onset of the COVID-19 pandemic, vendors target vaccine developers and offer customized and flexible SUB technology. Acquisitions of emerging/small, specialized single-use suppliers, product portfolio development, expansion in regional markets, and strengthening of global distribution networks are the major strategies adopted by vendors in the market.

Prominent Vendors

Thermo Fisher Scientific

Sartorius Stedim Biotech

Danaher

Merck KGaA

Avantor

Other Prominent Vendors

Applikon Biotechnology

Eppendorf

CESCO Bioengineering

Corning

Rentschler Biopharma SE

Entegris

Meissner Filtration Products

Parker-Hannifin Corporation

PBS Biotech Inc.

Saint-Gobain

Sentinel Process Systems

ABEC

Adolf K?hner

Charter Medical

Holland Applied Technologies

Repligen

Solaris Biotech Solutions

3M Company

Lonza

Pneumatic Scale Angelus

ARTeSYN Biosolutions

Wego Group

Distek

New Horizon Biotech

OmniBRx Biotechnologies

Yposkesi

Charge Point Technology

High Purity New England

PendoTECH

AdvantaPure

TBL Performance Plastics

Cellon

Sysbiotech

Broadley-James

CerCell A/S

PreSens-Precision Sensing GmbH

Emerson Electric Co.

Colder Products Company (CPC)

Watson-Marlow Fluid Technology Group

Foxx Life Sciences

DrM (Dr. Mueller AG)

W.L. Gore & Associates

KEY QUESTIONS ANSWERED

1. How are product launches and technological advancements affecting the single-use bioprocessing market?
2. What is the impact of COVID-19 in the SUB market?
3. What is the market size and growth rate of the single-use bioprocessing market?
4. Who are the key players in the market? What are significant acquisitions &

collaborations witnessed in the market?

5. Which region is likely to be the highest revenue generator in the market?

6. What are the factors driving the growth of the single-use bioprocessing market during the forecast period?

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